VLCT PACIF Online University
Administrator Guide

Welcome to the VLCT PACIF Online University! We are glad you are training with us! As you have been designated as an **Administrator** for your organization, we wanted to provide you with some step-by-step instructions to managing your organization's use of the Training Center, all in the **Administration** tab.

Step 1: Assign Training

Once your employees are enrolled into the University, they are automatically assigned the courses from the Workplace College that best matches their occupation through the job profile function. These courses will show up in their **My Training** tab. If an employee is missing a course from their offering, as the Administrator you can assign the missing course.

Enrollment Option 1:

1. Click **Group Enrollment Tool**.
2. Click on the folder to select your entire organization.
3. Select the users from the group on the left. (Hold the **Control** key or **Click and Drag** to select more than one).
4. Select the course or profile from the right. Click **Description** if you would like to read more about the course.
5. Click **Submit**.

Enrollment Option 2:

1. Click **User Profile Admin**.
2. Click **Assign Courses**.
3. Choose the department or individual from the tree list. When choosing an entire department, click on the folder to highlight with a check mark and click again to select.
4. Select the users from the group on the left. (Hold the control key or click and drag to select more than one.)
5. Select the course or profile from the right. Click **Description** if you would like to read more about the course.
6. Click **Submit**.

Step 2: Track Progress

Now that your employees have taken courses, you can check on their progress through the **Administration** tab.

Hierarchy Transcript Report – This shows a summary of all tests that have been attempted:

1. Click **Hierarchy Transcript Report**.
2. Click on the folder to highlight with a check mark and click again to select.
3. Select the different ways you want to sort and filter the information by using the drop down menus and check boxes.
4. Leave the box checked to view all courses or select specific courses from the list. (Hold the **Control** key or **Click and Drag** to select more than one). If you would like to export the report to an Excel spreadsheet select the box **Output to MS Excel.**
5. Click **Submit**.

Individual Transcript Report – This shows a summary of all tests an employee has attempted:

1. Click **Individual Transcript Report**.
2. Click on the employee's name you wish to view.
3. Select the different ways you want to sort and filter the information by using the drop down menus and check boxes.
4. Leave the box checked to view all courses or select specific courses from the list. (Hold the **Control** key or **Click and Drag** to select more than one). If you would like to export the report to an Excel spreadsheet select the box **Output to MS Excel.**
5. Click **Submit**.

Activity Report – This shows activity on all courses your employees have been assigned:

1. Click **Hierarchy Activity Report**.
2. Click on the folder to highlight with a check mark and click again to select.
3. Select the different ways you want to sort and filter the information by using the drop down menus and check boxes.
4. Leave the box checked to view all courses or select specific courses from the list. (Hold the **Control** key or **Click and Drag** to select more than one). If you would like to export the report to an Excel spreadsheet select the box **Output to MS Excel.**
5. Click **Submit**.

Individual Activity Report – This shows activity on all courses an employee has been assigned:

1. Click **Individual Activity Report**.
2. Click on the employee's name you wish to view.
3. Select the different ways you want to sort and filter the information by using the drop down menus and check boxes.
4. Leave the box checked to view all courses or select specific courses from the list. (Hold the **Control** key or **Click and Drag** to select more than one). If you would like to export the report to an Excel spreadsheet select the box **Output to MS Excel.**
5. Click **Submit**.

Additional reports are also available through the Training Center.

Step 3: Manage Your Employee's Changes

Your employees may need your help if they forget a password or username. To view your employee's information and make changes:

1. Go to the **ADMIN** tab and select **Edit User**
2. Select the employee
3. Select **Edit User Properties**
4. View information and make any needed changes
5. If changes are made, click **Submit**

Step 4: Activate and Deactivate Users

As employees turnover, you may want to make their profiles inactive. To activate and deactivate employees:

1. Go to the **ADMIN** tab and select **Group Activate/Deactivate Users**
2. Click on the folder to select your entire organization.
3. Select the employee(s) from the Active User Listing you would like to Inactivate.
4. Click the **Activate/Deactivate Users** button to deactivate the users.
5. To Activate employee(s), select the employee(s) from the Deactivate User Listing you would like to activate.
6. Click the **Activate/Deactivate Users** button to deactivate the users.

Step 5: Document Training

Now your employees have completed courses, you can print **Course Certificates** for their personnel files.

1. Click **User Admin**.
2. Click **Print Group Certificates**.
3. Choose the department or group from the tree list. Click on the folder to highlight with a check mark and click again to select.
4. Select the users from the group on the left. (Hold the **Control** key or **Click and Drag** to select more than one).
5. Select the course or courses from the right. Click **Description** if you would like to read more about the course.
6. Click **Submit**.
7. Print out the certificates in the pop up window, making sure your printer orientation is set to **Landscape** mode.

Step 6: Manage Blended Learning

Online courses are a convenient and engaging way to learn at work, but it is important to track all of the learning events an employee takes part in. Using VLCT PACIF Online University, you can add and track external learning events.

External Learning Events: Relevant external learning events can be added to an employee's transcript

1. Click **Learning Event Admin**.
2. Click **Add External Learning Event**.
3. Enter a name, select an event type and enter an event duration.
4. If you would like certificates to be printed for the event make sure **Allow Certificates** is checked.
5. If you would like to change the distribution of the learning event, click **Edit**. Choose from the tree list who you would like to have access to the learning event.
6. You have the option to add a **Repeat Interval** and **Description**.
7. Click **Submit**.
8. Click **Go To 'Record Transcripts' Page** to record the learning event on employee records.
9. Choose the department or group from the tree list. Click on the folder to highlight with a check mark and click again to select.
10. Select the users from the group on the left. (Hold the **control** key or click and drag to select more than one.)
11. Select **Event Type** then **Event** from dropdown menus.
12. Mark **Complete** or **Incomplete** then enter **Grade** (if any) and **Status Date** (date learning event took place). Entering **Vendor** and **Next Due Date** is optional.
13. Click **Submit**.

Step 6: Upload Policies

The Policy Acknowledgement System (PAS) provides member employees with the ability to view and acknowledge organizational policies. These policies are conveniently and securely stored on FNL servers and are available for your employees to view at the click of a button. Administrators at any level can upload/update policies, assign policies to their reporting group through the profile system, and specify the workplace colleges where the policies will reside.

To Upload or Replace a Policy

1. Click **Assign A Policy To A Reporting Group**.
2. You can place a policy at any level within your organization. Choose the department or group from the tree list. Click on the folder to highlight with a check mark and click the folder again to select.

TIP: If you place a policy at the organizational level, all employees will have access to the policy. If you place a policy at the department level, only those employees in that department will have access to the policy. If you place a policy at the division level, only those employees within that division will have access to the policy.

3. Select the policy type from the drop-down list. Policy types have been predetermined by VLCT PACIF.
4. Once you have selected the policy type, click the **Browse** button. This opens a window of files on your computer. Browse through your computer to find the policy you wish to upload. Click on the file. Once the file name field is populated with the name of the file you are uploading, click **Open**. Only upload PDF files.
5. This will take you back to the Training Center, click on **Upload**.
6. You will receive a message on the left which will provide you with information as to which file you uploaded with the words "your file uploaded successfully". Once you receive this message, click on the **Next** button.
7. Review the next page for accuracy, click **Assign To Workplace College** to move to the next screen.
8. Now you are ready to assign the policy to the appropriate Workplace Colleges. Check the checkboxes to the left of the Workplace Colleges where you wish this policy to reside. Click **Submit** to save.
   TIP: If the policy you uploaded was at the organization level you can view and test the policy by clicking on the Workplace College, and click on the policy to launch. If the policy was uploaded to a specific department or division, you must be associated with that department or division to view and test.

To Edit a Workplace College Assignment of a Policy

1. Click **Edit Policy to Workplace College Assignment**.
2. Navigate through the tree list as you did previously (see #2 above) and select the reporting group for which you wish to edit a Workplace College assignment.
3. Select the policy from the drop-down list.
   TIP: Only the policy types you have a policy associated to will show up.
4. Click **Submit**.

Check the checkboxes to the left of the Workplace Colleges where you wish this policy to reside. Click **Submit** to save.

Profile Instructions

Profiles allow you to target training to specific positions and duties. Once created profiles can provide an automated approach to relevant course assignments, course due dates, or recurrence periods automatically from the profiles. Profiles are hierarchical based and can be overridden at lower levels in the chain with completely different training.

There are three types of profiles that can be created:

- Courses assigned automatically to users upon registration
- Courses assigned based on a “yes” response to a question
- Courses assigned based on a drop-down box selection, usually a job function

If your entity would like to automatically assign courses to users based on profiles, you must enable the entity or department’s to “push training” at registration. See “Configure Reporting Groups for Prescribed Training” below.

Once profiles are created they can be assigned to users from the following functions:

- User Self-Registration
- User can add profiles through the **My Profile** located in the **Student Center**
- Administrators can assign profiles to users through the **Assign Training Tool**
- Initiate the Validation tool to already registered users on the system who have not yet received any profile assignment. You will need to contact FNL for this function.

Review/Override Standing Profiles

The Online University provider may already have standing profiles available with recommended courses for a particular job function or question-based profile. As these profiles are viewable and selectable by your users it important to look here first and edit these profiles to fit your entity. This will eliminate duplications and confusion regarding profile selection to the user.

6. Click **Review/Override Standing Profile Templates.**
7. Select a profile from the drop down box.
8. Click **Submit**.
9. At this point **Review** the profile to determine if editing of course assignment, due date, or recurrence periods is needed. If so, click the Back button to return to the previous page.
10. You have the option to choose a specific department or group that will receive a profile. You can do this through the **Override Group**. Click **Override Group** and then through the hierarchy tree select the department who will receive this profile. When choosing a department, click on the folder next to the department with a check mark and click again to select.

11. This will take you back to the review/override standing profiles. Click **Create Override** which will take you to the current profile that you are able to change.
12. In the **Profile Courses** area, click on the **Remove** button to remove courses from the profile.
13. In the **Available Courses** area, click on the **Add** button to add any courses to the profile.
14. Once you have selected the courses that will be a part of this profile, you have the option to add **Initial Due Dates** and **Recurrence Periods** to the profile. Enter the number of days for each course. Note: The Due Dates and Recurrence Periods are an optional setting. If you do not have a time period for a course, leave the setting at "0".
15. Select **Update All Fields** once you have completed the **Profile Courses** section.
16. Once you have created the profile, you will need to update the users in your authority who are assigned to the profile. Select **Update Users Assigned to Profile** located towards the top of the page. Click **Submit** to update user's profile.
    a. If you would like to update the course's due date and recurrence period to match the profile, select the box before you submit.

Create a New Profile Template

If you do not see a profile that you can edit in the standing profiles, you have the ability to create a new profile.

5. Click **Create a New Profile Template.**
6. You have the option to choose a specific department or group that will receive a profile, you can do this through the **Override Group**. Click **Override Group** and then through the hierarchy tree select the department who will receive this profile. When choosing a department, click on the folder next to the department with a check mark and click again to select.
7. Enter the name of the profile in the field. This will be the name your users will see if they have the option to select a profile. Do not use symbols in this field.
8. Click **Submit**.
9. In the **Available Courses** area, click on the **Add** button to add any courses to the profile.
10. Once you have selected the courses that will be a part of this profile, you have the option to add **Initial Due Dates** and **Recurrence Periods** to the profile. Enter the number of days for each course. Note: The Due Dates and Recurrence Periods are an optional setting. If you do not have a time period for a course, leave the setting at "0".
11. Select **Update All Fields** once you have completed the **Profile Courses** section.
12. As this is a new profile, you will need to select the **Configure Profile for Auto-Enroll** button located at the top of the page to configure how this profile will be assigned.
13. In the first section select how you would like for users to receive this profile. You may choose only one setting in this area.
    a. **This is NOT an auto-enroll profile**. This is for profiles that will not be auto-assigned. Rather they will be assigned to users by Administrators through the **Assign Training** tool.

b. **This is an auto-enroll profile – question-based – users answering yes get assigned**. Select this box if you would like to have users answer “yes” to a question provided. Enter the question you would like the user to answer in the field below.
c. **This is an auto-enroll profile – all users get assigned**. Select this box if you would like all users to automatically receive this course.
d. **This is an auto-enroll profile – dropdown list –users assigned when this profile is selected**. Select this box if you would like the profile to be added to the current dropdown list of job functions.

14. In the second section of the profile settings you have the option to update due dates and recurrence periods of any existing authorized courses that match the profile created.
    a. Do nothing. Leave matching authorization, due date and recurrence period as is. This selection will not change any existing courses.
    b. Update authorization end date, due date, and recurrence periods to match profile. This selection will change authorizations to match the profile. Warning: If a user has several profiles associated to their ID and a course is repeated in the profiles, this function will override the due dates and recurrence period for the other profiles on the repeated course.
15. In the final section of the profile settings you have the option to update course authorizations that do not match the profile. We have locked this setting down as this option can potentially remove all existing courses not matching this profile from all users assigned to it. You must contact the Online University provider in order to change this function.
16. Once you have created the profile, you will need to update the users in your authority who are assigned to the profile. Select **Update Users Assigned to Profile** located towards the top of the page. Click **Submit** to update user’s profile.
    a. If you would like to update the courses’ due date and recurrence period to match the profile, select the box before you submit.

Edit Profile Template

If you have overridden a standing profile or created a new profile, you can edit this profile at any time through the edit profile template.

1. Select **Edit Profile Template.**
2. Select a profile from the drop down box.
3. Click **Submit**.
4. You have the option to choose a specific department or group that will receive a profile, you can do this through the **Override Group**. Click **Override Group** and then through the hierarchy tree select the department who will receive this profile. When choosing a department, click on the folder next to the department with a check mark and click again to select.
5. You can change the name of the profile, if you choose.
6. Click **Submit**.

7. In the **Profile Courses** area, click on the **Remove** button to remove courses from the profile.
8. In the **Available Courses** area, click on the **Add** button to add any courses to the profile.
9. Once you have selected the courses that will be a part of this profile, you have the option to add **Initial Due Dates and Recurrence Periods** to the profile. Enter the number of days for each course. Note: The Due Dates and Recurrence Periods are an optional setting. If you do not have a time period for a course, leave the setting at "0".
10. Select **Update All Fields** once you have completed the **Profile Courses** section.

<u>Follow the steps below if you need to update the profile settings. If not, jump to Step 15.</u>

11. As this is a new profile, you will need to select the **Configure Profile for Auto-Enroll** button located at the top of the page to configure how this profile will be assigned.
12. In the first section select how you would like for users to receive this profile. You may choose only one setting in this area.
    a. **This is NOT an auto-enroll profile**. This is for profiles that will not be auto-assigned. Rather they will be assigned to users by Administrators through the **Assign Training** tool.
    b. **This is an auto-enroll profile – question-based – users answering yes get assigned**. Select this box if you would like to have users answer "yes" to a question provided. Enter the question you would like the user to answer in the field below.
    c. **This is an auto-enroll profile – all users get assigned**. Select this box if you would like all users to automatically receive this course.
    d. **This is an auto-enroll profile – dropdown list –users assigned when this profile is selected**. Select this box if you would like the profile to be added to the current dropdown list of job functions.
13. In the second section of the profile settings you have the option to update due dates and recurrence periods of any existing authorized courses that match the profile created.
    a. Do nothing. Leave matching authorization, due date and recurrence period as is. This selection will not change any existing courses.
    b. Update authorization end date, due date, and recurrence periods to match profile. This selection will change authorizations to match the profile. Warning: If a user has several profiles associated to their id and a course is repeated profiles, this function will override the due dates and recurrence period for the other profiles on the repeated course.
14. In the final section of the profile settings you have the option to update course authorizations that do not match the profile. We have locked this setting down as this option can potentially remove all existing courses not matching this profile from all users assigned to it. You must contact the Online University provider in order to change this function.
15. Once you have created the profile, you will need to update the users in your authority who are assigned to the profile. Select **Update Users Assigned to Profile** located towards the top of the page. Click **Submit** to update user's profile.
    a. If you would like to update the courses' due date and recurrence period to match the profile, select the box before you submit.

Delete Profile Template

You can delete profile templates within your authorized hierarchy.

1. Select **Delete Profile Template.**
2. Select a profile from the drop down box.
3. Click the **Delete** button.
4. A message will pop-up warning you the deletion of a profile cannot be undone. Click **OK** to continue to delete the profile. Click **Cancel** to abort the process.

Configure Reporting Groups for Prescribed Training

To automatically assign courses based on the profile created:

1. Select **Reporting Group Administration.**
2. Select **Edit Hierarchy Groups.**
3. Work through the hierarchy tree until you arrive at the level 1 reporting group. This could be at a department or division level.
4. Once you have selected the department or division, click on the folder.
5. Under the **Edit Hierarchy** tool, check the box next to **"Push Group"**
6. Click **Submit.**

If you experience any difficulty call the help desk at 888-948-4949 x1.